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AI Network User Manual

This user manual has been prepared by Dannay Consulting for Aquatherm Industries. It provides an overview on key functionality for users of the new AI Network, a Sales Management Portal.

Dannay Consulting, 15 Brookside Lane, Northborough, MA 01532,
508.709.9077 www.dannay.com

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Aquatherm Portal "AI Network" User Manual

Overview

The AI Network is the Sales and Marketing Portal for Aquatherm Industries. It provides the following functions for dealers and distributors:

- Sales Management: ability to enter and track sales and warrantees (primarily dealers),
- Sales Management: run associated sales record reports and warranty registration reports
- Ordering: Submit orders for Product (distributors only), Literature and Wearables
- Marketing Support: Access and download assorted marketing materials and product materials (logos, brochures, install photos, specifications, etc.
- Communication: Aquatherm News, Directory, Forum (for peer to peer communication

This manual is set up to briefly review the portal functions available under each "Tab" using both text and annotated screen captures.

Home & Directory

The "**Home**" page is the default page when logging into the AI Network Portal. At a glance, it provides the latest news postings by Aquatherm, the latest forum topics and a "**Quick Look-up**" function to the Dealer/Distributor Directory.

Directory

The directory "**Quick Look-up**" function works just as it is called. As a user you may enter:

- "J" to list all the names in the directory starting with the letter "J"
- "j d" to list all the first names starting with a "J" who also have a last name starting with at "D"
- you may also enter any part of a name

The Quick Look-up function retrieves the name, phone number and email address for the individual.

Note, only users with access to the Portal are listed in the Directory.

You may also select the **Directory** submenu item to view a full listings in the directory.

Forum Tab & Functionality

Description

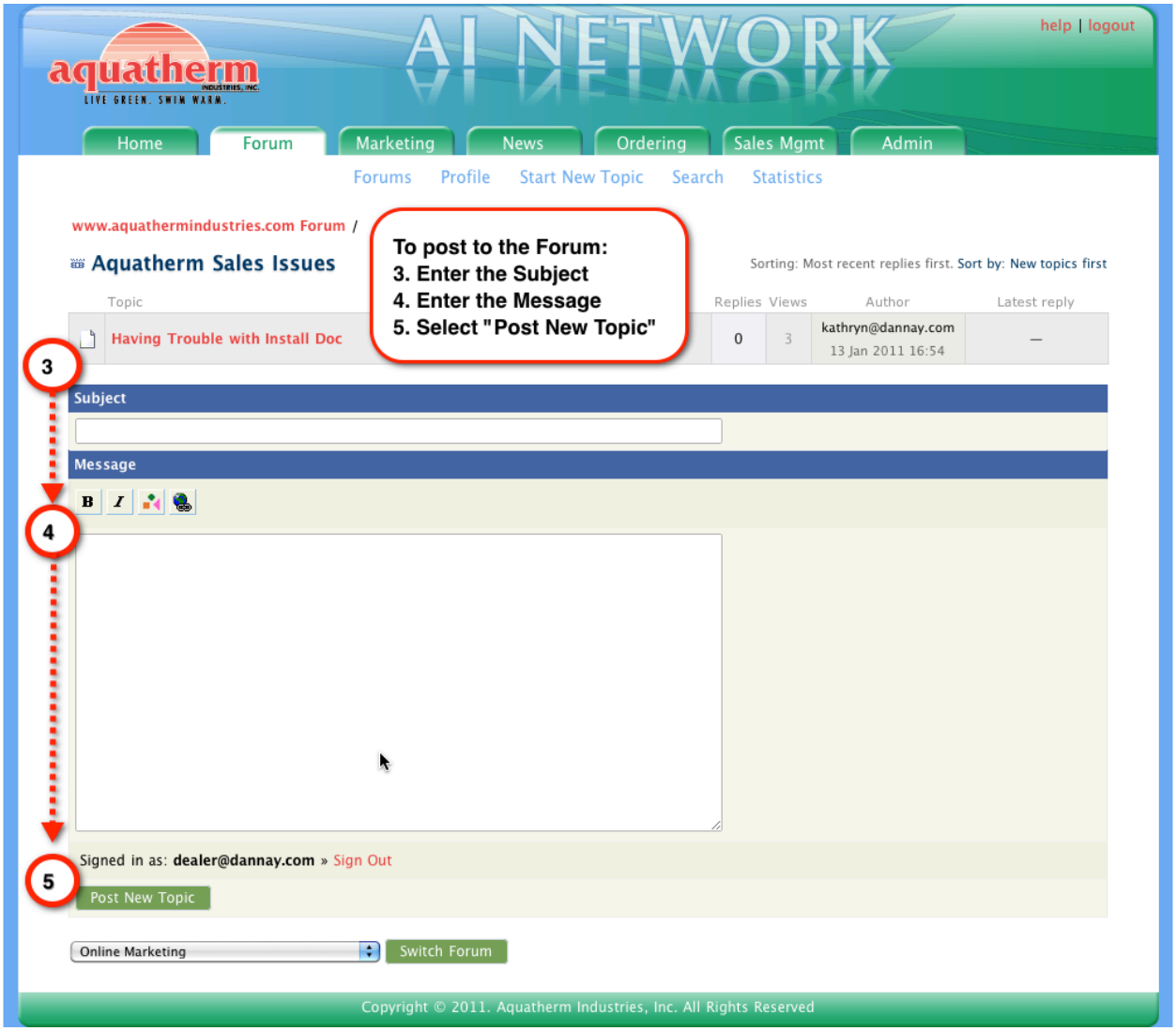
The Forum provides the capability for peer to peer communication and Aquatherm to dealer/distributor communication through various Forum topics. All users can view and post to the Forum.

Post to the Forum

To Post to the Forum (Screen 1 of 2):

To post to the Forum:
1. Select the Forum tab
2. Select the Forum title
help | logout
Home
Forum
Marketing
News
Ordering
Sales Mgmt
Admin
Profile
Search
Statistics
Signed in as: dealer@dannay.com » Sign Out
Forum
Topics
Replies
Aquatherm Sales Issues
Discussion on any sales issues that dealers and distributers may have.
1
0
Online Marketing
Discuss pros and cons of various online marketing opportunities. For example, who uses Google Adwords and how effective are Google Adwords leads?
0
0
Recent Topics
Sorting: Most recent replies first. Sort by: New topics first
Topic
Replies
Views
Author
Latest reply
Having Trouble with Install Doc
0
3
kathryn@dannay.com
13 Jan 2011 16:54
—
Copyright © 2011. Aquatherm Industries, Inc. All Rights Reserved

To Post to the Forum (Screen 2 of 2):



Start New Topic

To create a new topic within a forum, select the "**Start New Topic**" submenu item under the tabs. Then complete the Subject and Message fields as before, selecting "Post New Topic" button under the message field.

Forum Search

To search one or more Forums, select the "**Search**" submenu item under the tabs. Additional instructions are provided as well as search filters (e.g., type of search, where to search, which forum to search).

Marketing Tab and Functionality

Description

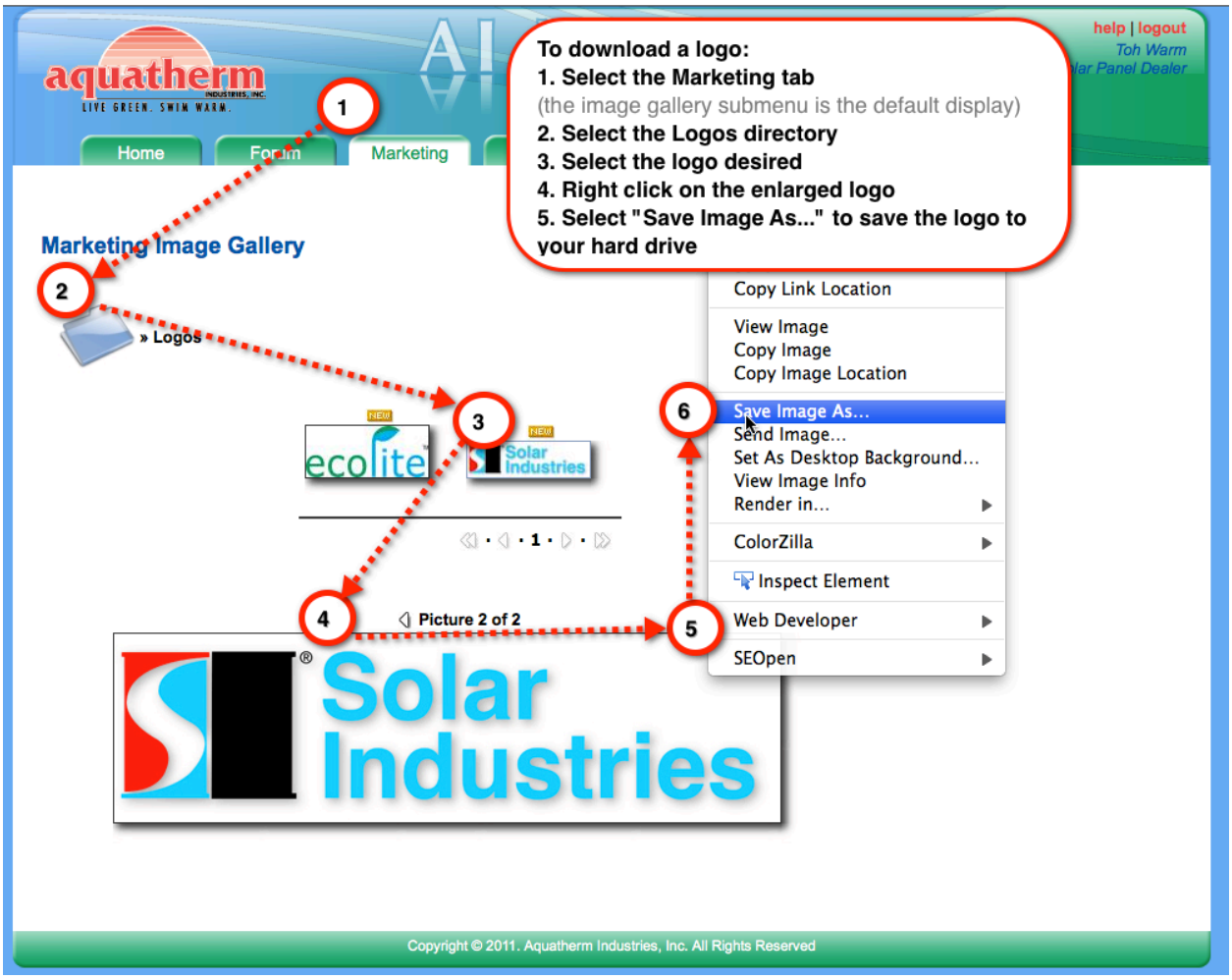
The Marketing Tab provides access to a variety of marketing materials (install photos, logos, brochures) and product related information (spec sheets, drawings, etc.). Due to the nature of the files, the image files, that is photos and logos of file formats .jpg, .gif, .png are included in the **Marketing Gallery**, while the specifications in PDF format are in the **Files** Directory. All users have access to all marketing materials.

Download an Image from the Marketing Image Gallery

To download an image from the Marketing Gallery (see image):

1. Select the "**Marketing**" tab
2. The "**Image Gallery**" should be the defaulted submenu option, and a number of folders are presented on the screen
3. Select the appropriate folder (e.g., logos if looking for a product logo) by clicking it
4. The logos in the folder are presented on the screen
5. Click on the logo you want to download, and it should open up in full format on the screen
6. Right click on the enlarged image, and select "**save image as**", and select the destination folder on your hard drive, and select "**Save**"

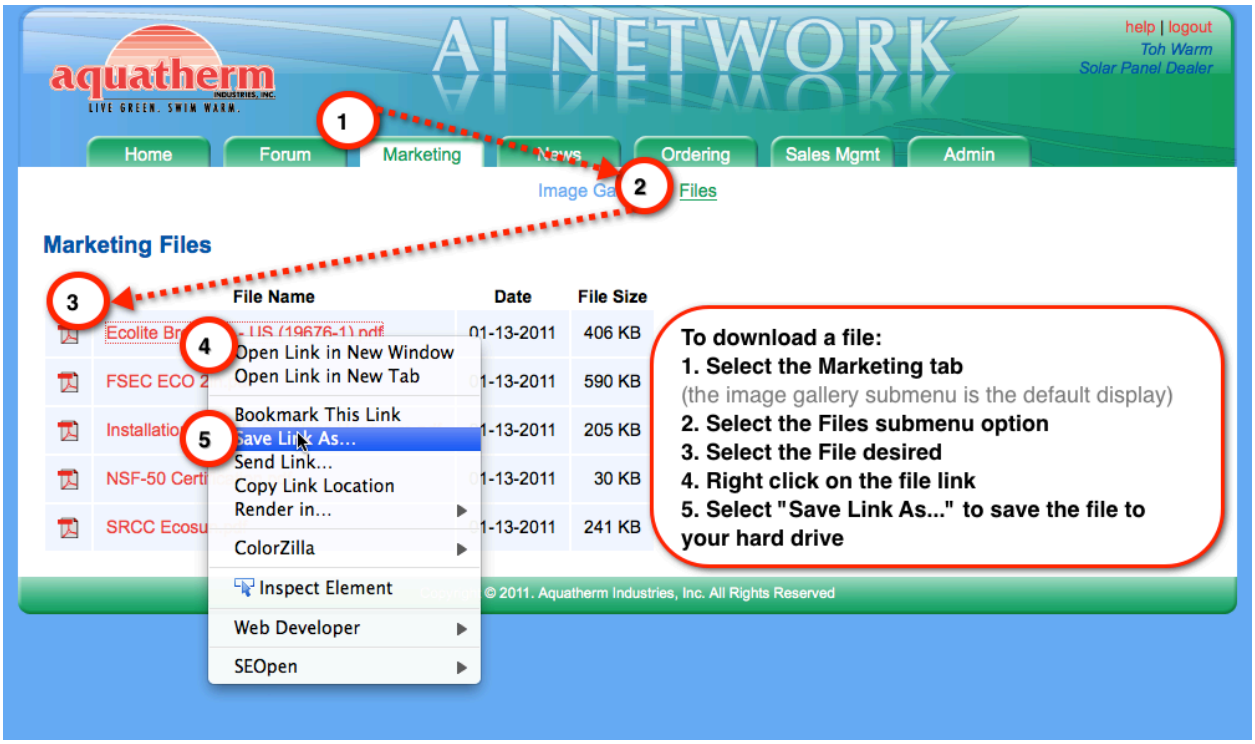
Note, if you right click on the thumbnail image, only the thumbnail image is downloaded. Be sure to open the image before selecting the "Save As" option.



Download a file from the Marketing File Directory

To download an image from the Marketing Gallery:

1. Select the "**Marketing**" tab
2. Select the "**Marketing Files**" submenu option, and a list of files are presented on the screen.
3. Identify the file to download, and **Click on** the document link,
4. You will be prompted to save to your hard drive, navigate to the desired location, and select "**Save**"



News Tab

Description

The News tab accesses blog functionality that enables Aquatherm staff to post news and updates to the network. All users have access to the News area and are able to "comment" on news postings. Only Aquatherm has posting permissions. The News function is provided by the WordPress content management system.

News articles are categorized by Aquatherm and archived by month. Users have permission to add comments to News postings.

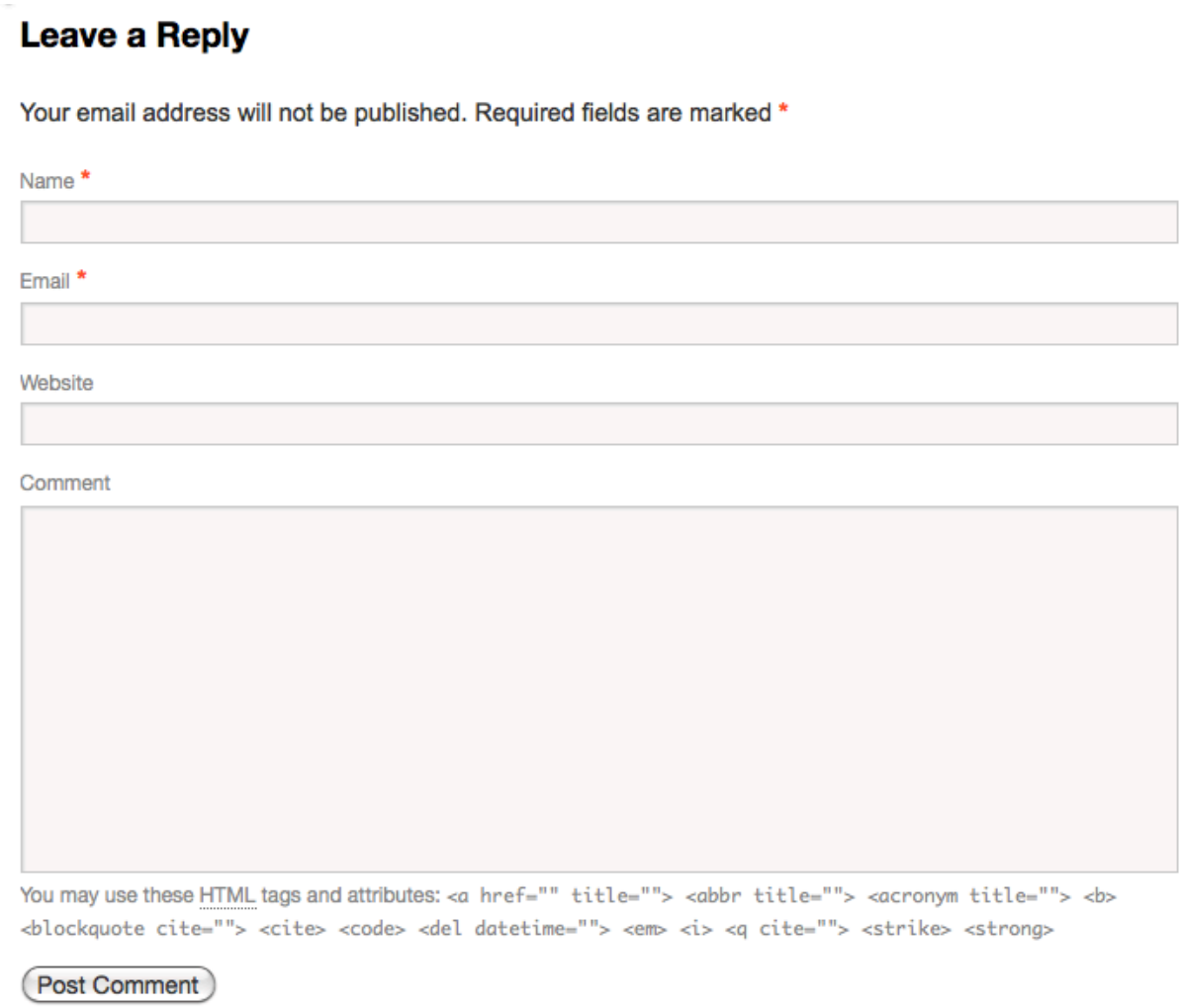
News Search

There is a search option in the upper right of the screen to search all news postings. Enter a term or keyword an select "search".

Adding a Comment to a News Article

At the bottom of each news article is a link "leave a comment". Select the link and a "Leavea a Reply" form is displayed as in the following image.

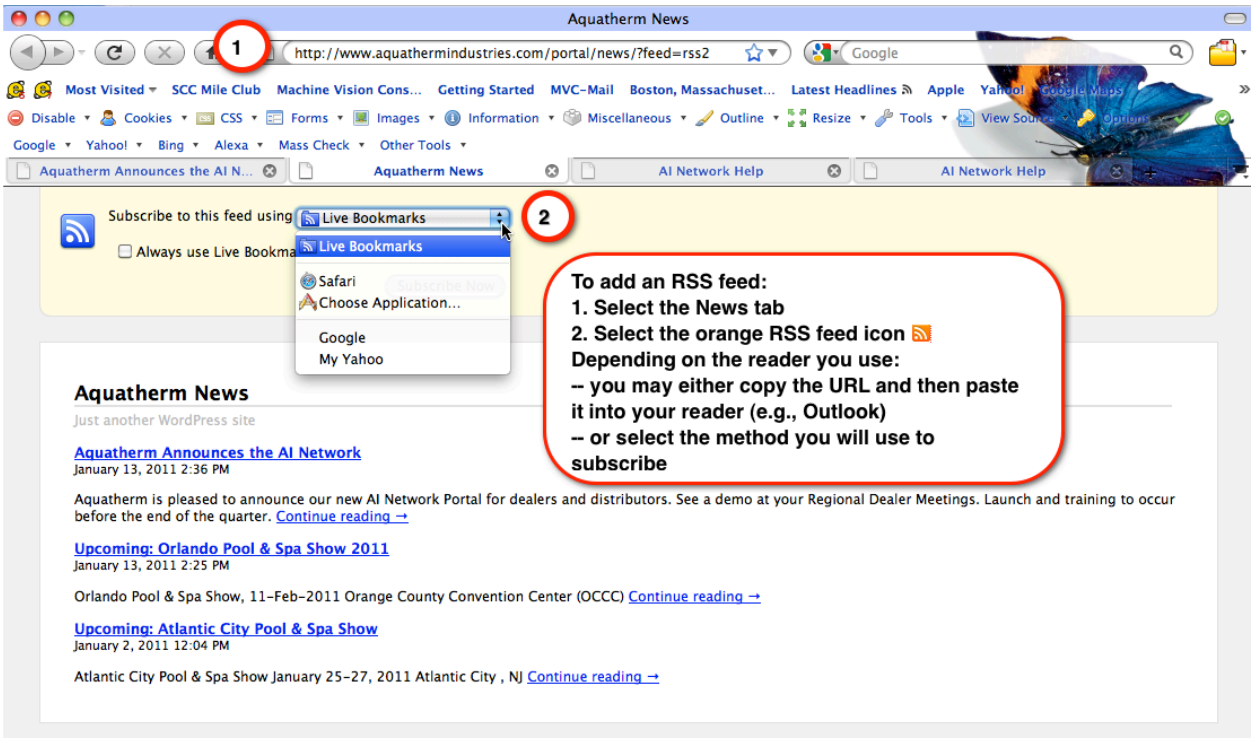
Enter your name, email address and your comment. Then select “Post Comment”.



News Feed –Receiving updates – the RSS feature

The news section has an RSS feed. RSS stands for Really Simple Syndication. If you have an RSS reader (note it may be part of Outlook, Yahoo, Google or a function within your browser), you can select the RSS feed icon , copy the displayed URL and paste it into your RSS feeder. The RSS feed icon can be selected from the top right of the “News” page.

This function allows you to receive all news updates directly when they occur, eliminating the need to log into the portal to see the latest news.



Ordering – Product, Literature and Wearables

Description

The ordering process for "Product" (Distributors only), "Literature" and "Wearables" is the same. A user enters the information for the order (e.g., billing address, PO, shipping address) and then selects the items for the order by entering the quantity in the box provided. When complete, the order is submitted. The order is emailed to Aquatherm and a copy of the order is sent to the requester.

Ordering

To place an order:

1. Select the "**Order**" tab
2. From the submenu, select the type of Order you would like to place: "Product" (distributors only), "Literature" or "Wearables".
3. Upon selecting the submenu, an order form is presented
4. Start by selecting the current date - you may type this in (MM/DD/YYYY) OR use the calendar icon to select a date from the calendar
5. Select the button "Copy User Info" into the "bill to" section if the order should be billed to your company (or enter a different "bill to" as appropriate)
6. Enter a Purchase Order number in the "PO#" field
7. If the ship to information is the same, select the button "Copy User Information" to copy your company information into the "ship to" section of the form
8. Enter a preferred "Ship Date" by either typing it in (MM/DD/YYYY) or by selecting the calendar icon and using the calendar to enter a date
9. Complete the "Ship Via" field (if you have a preferred carrier)
10. Enter the "Freight Info" in the field provided

11. Select whether the order is tax deductable
12. If helpful, enter any "Notes/ Comments"
13. In the field next to the item number, enter the quantity desired
14. When quantities for all items have been entered, submit the order by selecting the "**Submit Order**" button
15. Upon selecting the button, a confirmation message should appear on the screen, "Your Order Form has been submitted to Aquatherm. A confirmation email will be sent to you shortly."
16. You will also receive an email confirmation with a copy of your order

Sales Management

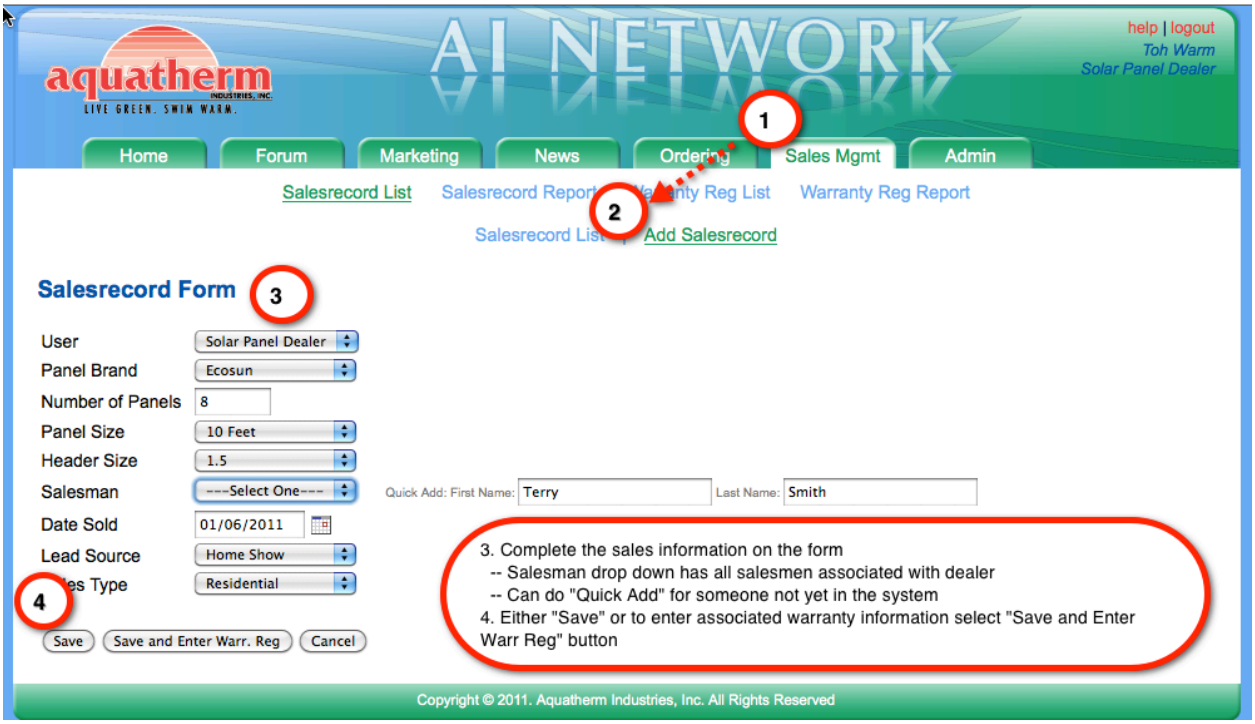
Description

The Sales Management function enables dealers (and distributors who do installs) to enter and track their sales, run sales reports and enter and run a report on warranty registrations.

Add A Sales Record

To enter a sales record into the system:

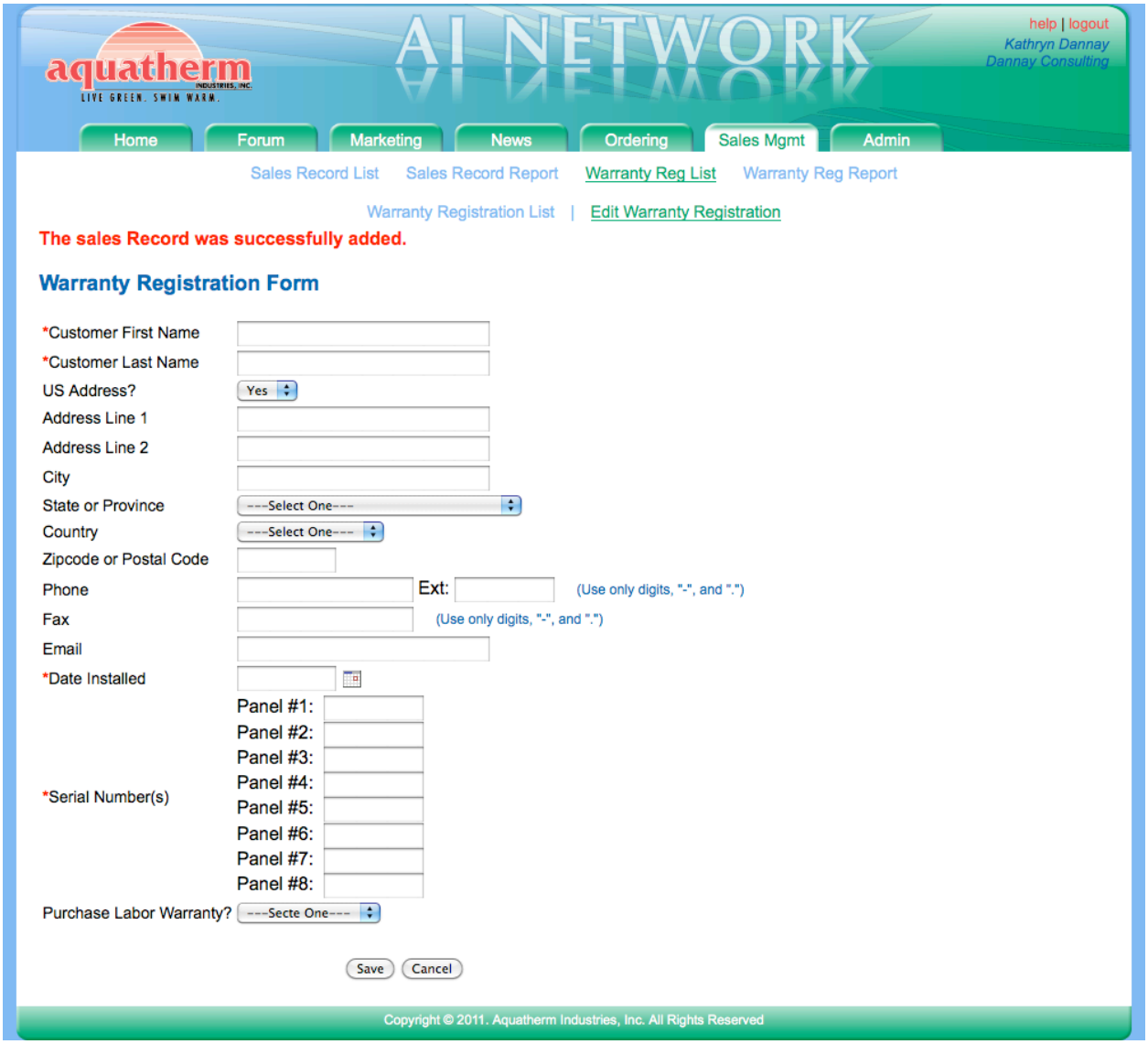
1. Select the "Sales Management" tab (*The default screen is for the first submenu "Sales Record List"*)
2. Select the third tier menu item "Add Sales Record", a Sales Record Form is Displayed
3. Complete the sales form information
    a. The salesman drop down contains all the salesmen for the associated dealer
    b. Can use the "Quick Add" fields to automatically add a salesman for this sale (and it will save the name into the system for the future)
4. Either "Save" or to enter associated warranty information select "Save and Enter Warr Reg" button



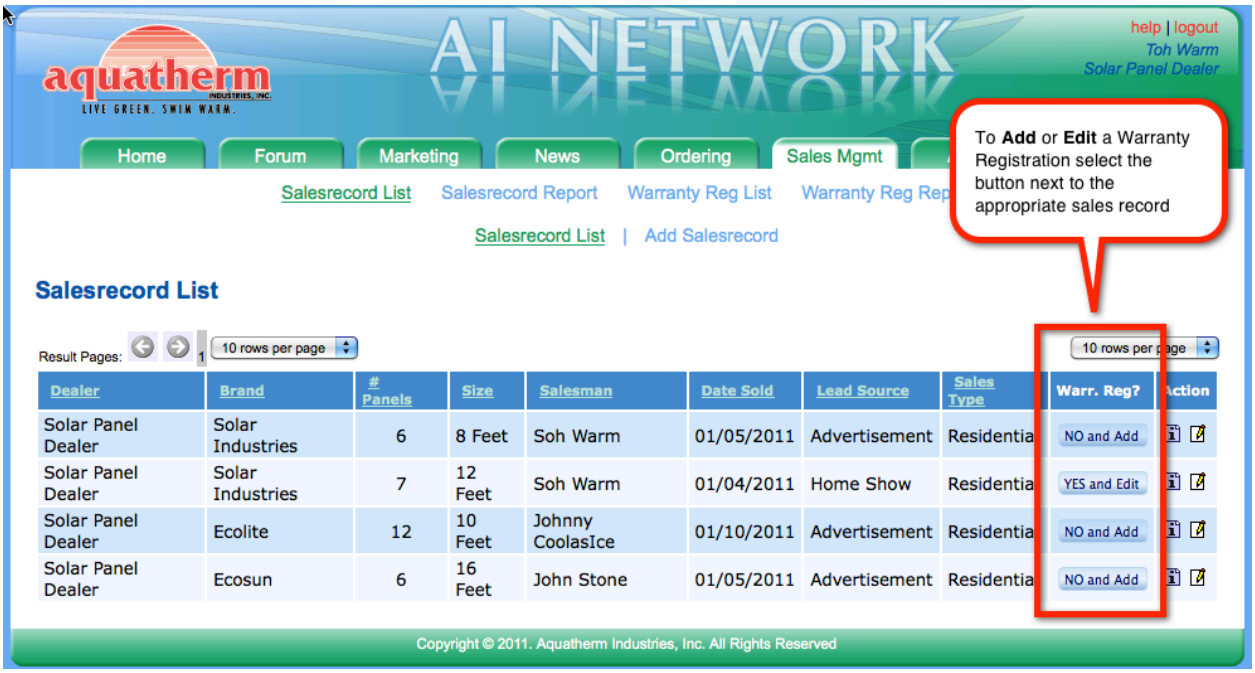
Add/Edit a Warranty Registration to a Sales Record

The Add a Sales Record form is designed to add a warranty registration at the time of entry, by using the "Save and Enter Warr Reg" button. When this button is selected, a Warranty Registration Form is provided (see screenshot).

Complete the form with the required customer information including panel serial numbers. Select whether or not a Labor Warranty is included. Select "**Save"**.



It is also possible to add a Warranty Registration to a Sales Record from the Sales Record List OR from the Sales Record Report. Each listing has a column indicating whether a Warranty Registration is associated with a Sales Record.


AI NETWORK
aquatherm
help | logout
Toh Warm
Solar Panel Dealer
Home
Forum
Marketing
News
Ordering
Sales Mgmt
Salesrecord List
Salesrecord Report
Warranty Reg List
Warranty Reg Rep
Salesrecord List | Add Salesrecord
To Add or Edit a Warranty Registration select the button next to the appropriate sales record
Salesrecord List
Result Pages:
10 rows per page
Dealer
Brand
Panels
Size
Salesman
Date Sold
Lead Source
Sales Type
Warr. Reg?
Solar Panel Dealer | Solar Industries | 6 | 8 Feet | Soh Warm | 01/05/2011 | Advertisement | Residentia | NO and Add
Solar Panel Dealer | Solar Industries | 7 | 12 Feet | Soh Warm | 01/04/2011 | Home Show | Residentia | YES and Edit
Solar Panel Dealer | Ecolite | 12 | 10 Feet | Johnny CoolasIce | 01/10/2011 | Advertisement | Residentia | NO and Add
Solar Panel Dealer | Ecosun | 6 | 16 Feet | John Stone | 01/05/2011 | Advertisement | Residentia | NO and Add
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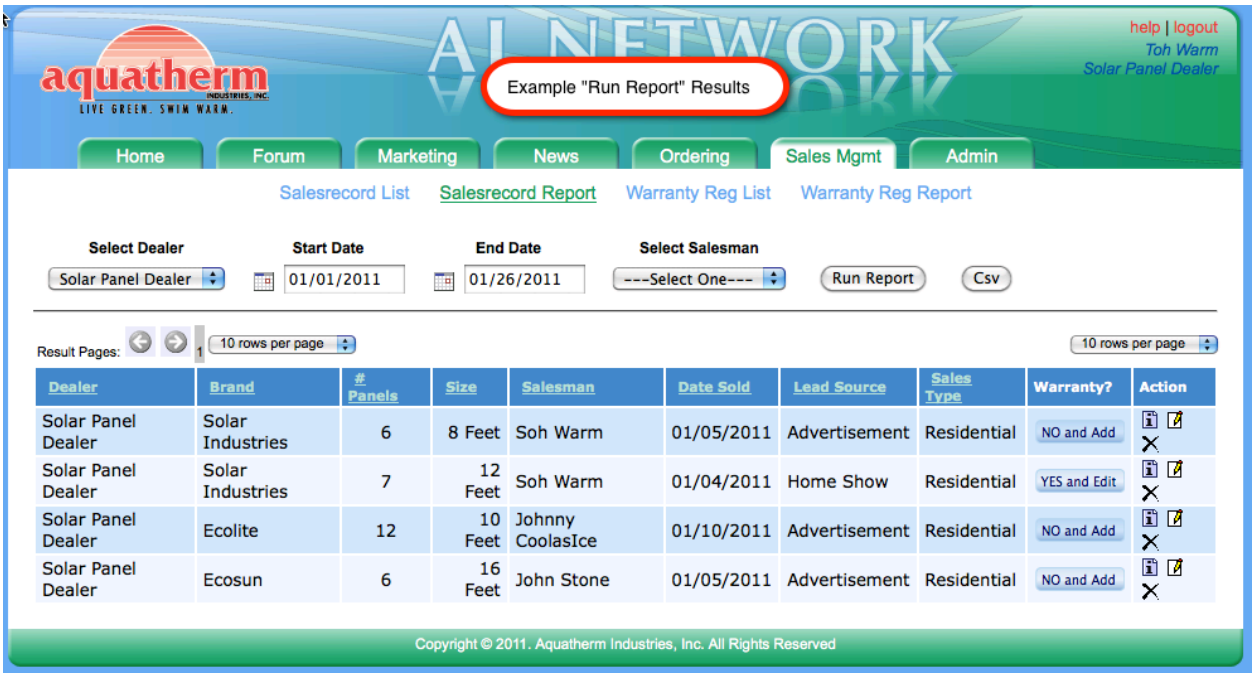
Run A Sales Record Report

To run a Sales Record Report:

1. Select the "**Sales Management**" tab
2. Select the "**Sales Record Report**" submenu item
3. The default screen provides filters for the report
4. Enter the calendar period for the report by selecting the calendar icon to enter the "**Start Date**" and "**End Date**"
5. Select the Salesmen OR to run the report for all sales, leave this pull down on the default of "select one"
6. Select the "**Run Report**" button to view the Report on Screen
7. Select the "**Csv**" button to download a comma separated file that can be imported into Excel

Here is an example of the "Run Report" Results:



Run A Warranty Registration Report

To run a Warranty Registration Report is almost the identical process to the Sales Record Report:

1. Select the "**Sales Management**" tab
2. Select the "**Warranty Reg Report**" submenu item
3. The default screen provides filters for the report
4. Enter the calendar period for the report by selecting the calendar icon to enter the "**Start Date**" and "**End Date**"
5. Select the Salesmen OR to run the report for all sales, leave this pull down on the default of "select one"
6. Select the "**Run Report**" button to view the Report on Screen
7. Select the "**Csv**" button to download a comma separated file that can be imported into Excel

Admin

Description

The Admin function provides for:

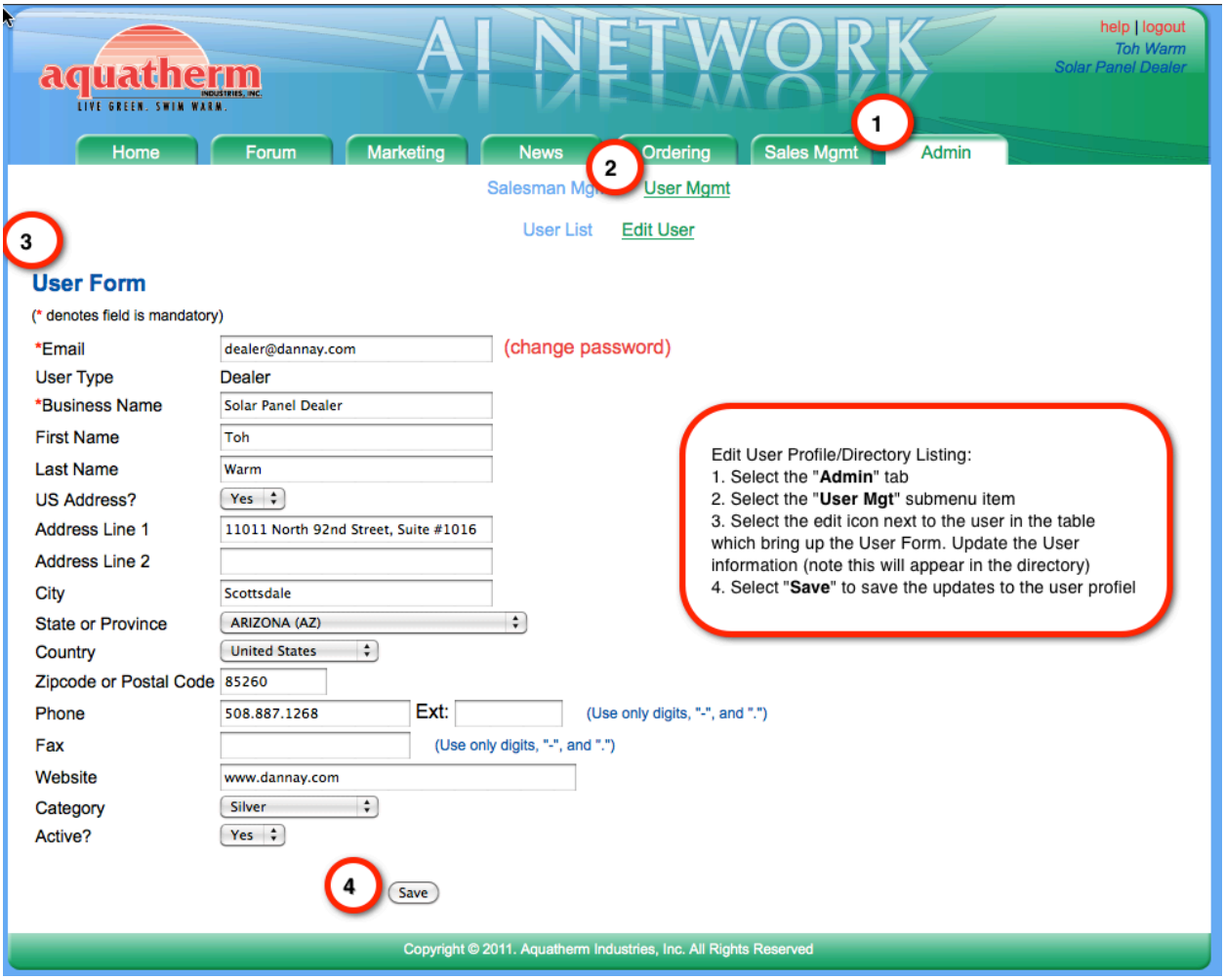
- Editing of a User profile and
- Adding of a Salesman to a dealer.

Edit Profile/Directory Listing and Change Password

The user information is the same information that appears in the Portal Directory. To edit or update this information:

1. Select the "**Admin**" Tab (the default screen is the user list for a dealer)
2. The current information is summarized in the table. On the right in the last column, there are two icons. The icon is to "view" the complete profile, the (pencil with a paper) icon is the "edit" option.

3. Select the "edit" icon to edit the user profile and display the **User Form**
4. To Change the password, select the change password link next to the dealer email
5. Make updates or edits and "**Save**" the form



Add a Salesman (Dealers Only)

To add a Salesman to be associated with a dealer:

1. Select the "**Admin**" Tab (the default screen is the user list for a dealer)
2. Select the "**Salesman Mgt**" submenu option, the default screen is the "Salesman List"
3. Select the "**Add Salesman**" submenu option, and the Salesman Form is displayed
4. Enter the First and Last Name of the Sales person
5. The default status should be Active or "Yes"
6. Select the "**Save**" button.

Edit a Salesman (Dealers Only)

To edit a Salesman to be associated with a dealer:

1. Select the "**Admin**" Tab (the default screen is the user list for a dealer)
2. Select the "**Salesman Mgt**" submenu option

3. The current Salesmen are listed in the table. On the right in the last column, there are two icons. The icon is to "view" the Salesman profile, the (pencil with a paper) icon is the "edit" option.
4. Select the "edit" icon to edit the Salesman name or status and display the **Saleman Form** ***NOTE: Salesmen who are no longer with the dealership should have their status set to "Inactive"***
5. Make edits and "**Save**" the form